

Pattern-based Strategy

**Strategically Aligning Information Management
for Mission Success**

3/17/2011

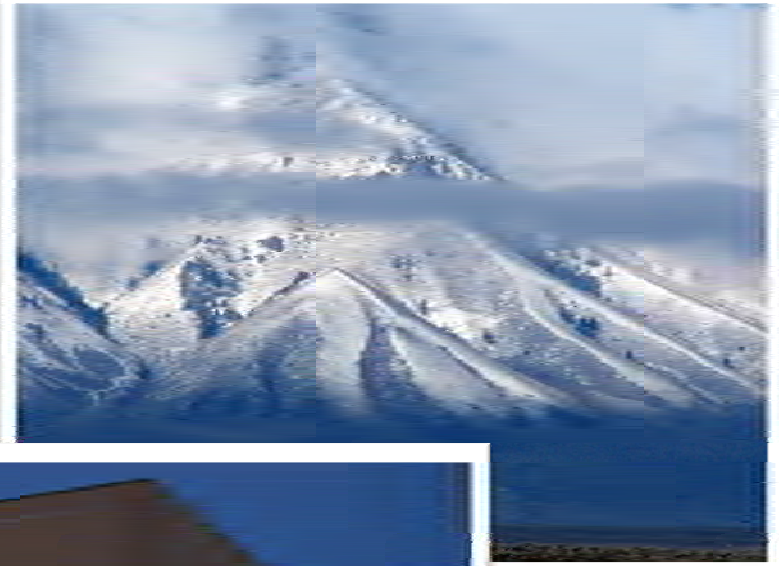
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Report Documentation Page				Form Approved OMB No. 0704-0188	
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1. REPORT DATE 17 MAR 2011		2. REPORT TYPE		3. DATES COVERED 00-00-2011 to 00-00-2011	
4. TITLE AND SUBTITLE Pattern-based Strategy. Strategically Aligning Information Management for Mission Success				5a. CONTRACT NUMBER	
				5b. GRANT NUMBER	
				5c. PROGRAM ELEMENT NUMBER	
6. AUTHOR(S)				5d. PROJECT NUMBER	
				5e. TASK NUMBER	
				5f. WORK UNIT NUMBER	
7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES) Idaho National Laboratory, 2525 Fremont Avenue, Idaho Falls, ID, 83415				8. PERFORMING ORGANIZATION REPORT NUMBER	
9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES)				10. SPONSOR/MONITOR'S ACRONYM(S)	
				11. SPONSOR/MONITOR'S REPORT NUMBER(S)	
12. DISTRIBUTION/AVAILABILITY STATEMENT Approved for public release; distribution unlimited					
13. SUPPLEMENTARY NOTES Presented at the 23rd Systems and Software Technology Conference (SSTC), 16-19 May 2011, Salt Lake City, UT. Sponsored in part by the USAF. U.S. Government or Federal Rights License					
14. ABSTRACT					
15. SUBJECT TERMS					
16. SECURITY CLASSIFICATION OF:			17. LIMITATION OF ABSTRACT Same as Report (SAR)	18. NUMBER OF PAGES 22	19a. NAME OF RESPONSIBLE PERSON
a. REPORT unclassified	b. ABSTRACT unclassified	c. THIS PAGE unclassified			

About Me

- Idaho National Laboratory
 - Nuclear Programs
 - National & Homeland Security
 - Energy & Environment
- Information Management
 - Manager of IM Strategic Planning
 - Enterprise Architect




Mission

- Ensure the nation's energy security with safe, competitive, and sustainable energy systems and unique national and homeland security capabilities.

Vision

- By 2015, INL will be the pre-eminent nuclear energy laboratory with synergistic, world-class, multi-program capabilities and partnerships.



The background of the slide features a light blue compass rose with white lines and a large white dollar sign (\$) in the lower right corner. The text is overlaid on a semi-transparent white rectangular area.

Operational effectiveness and **STRATEGY** are both essential to **SUPERIOR PERFORMANCE**...but they work in very different ways.

A company can outperform rivals only if it can establish a **DIFFERENCE** it can **PRESERVE**.

-Michael Porter, HBR, 1996

Examples

amazon.com.

BARNES & NOBLE



Pattern-based Strategy










Patterns + Context = Strategy



Patterns

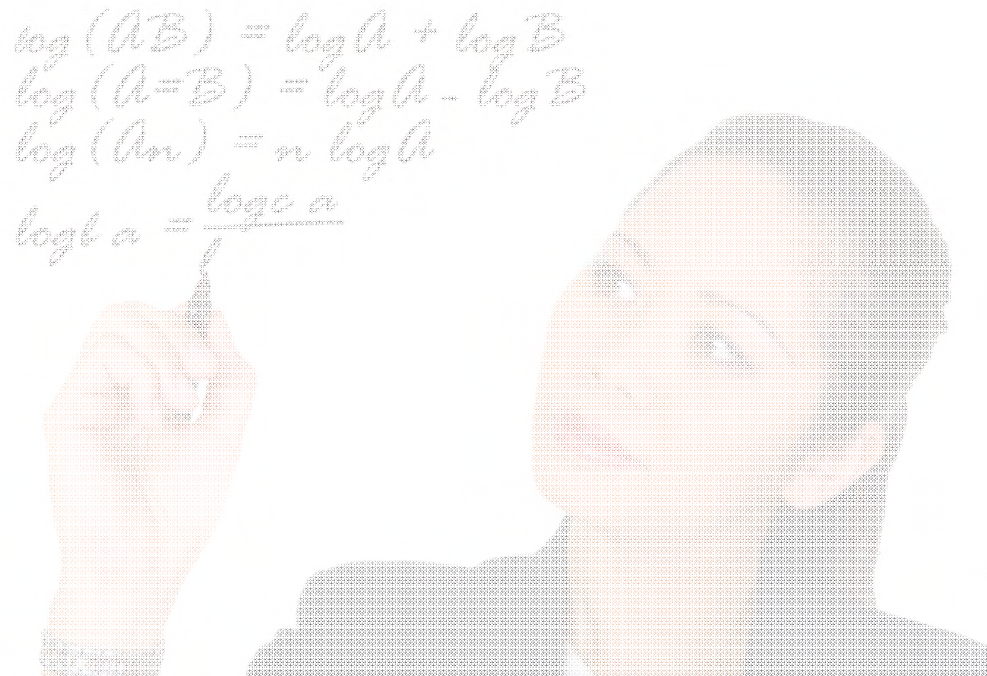
Groups and structures in the data that are, in some way or another, **similar**.

Business Context

<p>Key Partners </p>	<p>Key Activities </p>	<p>Value Propositions </p>	<p>Customer Relationships </p>	<p>Customer Segments </p>
	<p>Key Resources </p>		<p>Channels </p>	
<p>Cost Structure </p>		<p>Revenue Streams </p>		

What is Strategic?

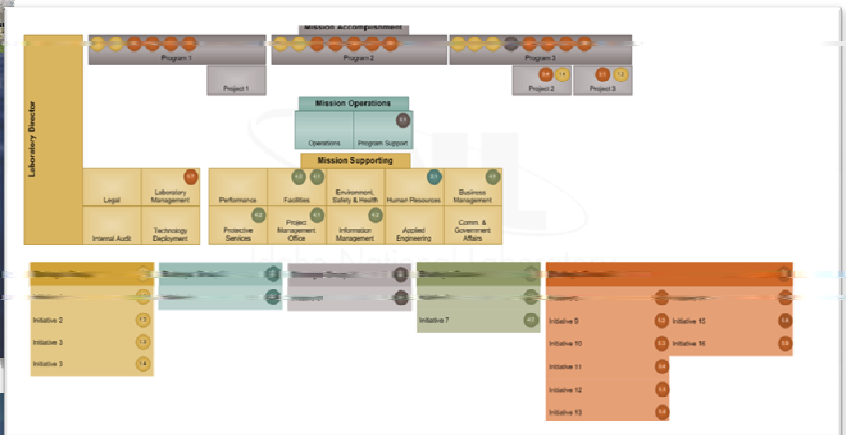
- Things are strategic because they support the company's sources of **competitive advantage**.
 - Things that are valued and attractive to customers
 - Things that are unique in the marketplace
 - Things that are not easily copied
 - Things that are not easily substituted by other things
- **Mark P. McDonald, Gartner**

A woman with dark hair is shown from the chest up, looking towards the camera. She is holding a black marker in her right hand and is in the process of writing on a transparent surface. The surface has four logarithmic formulas written on it in a light gray, cursive-like font. The formulas are:
$$\log(AB) = \log A + \log B$$
$$\log(A/B) = \log A - \log B$$
$$\log(A^n) = n \log A$$
$$\log_b a = \frac{\log a}{\log b}$$

The woman is wearing a dark-colored top. The background is a light blue gradient.

“Know thy Customer”

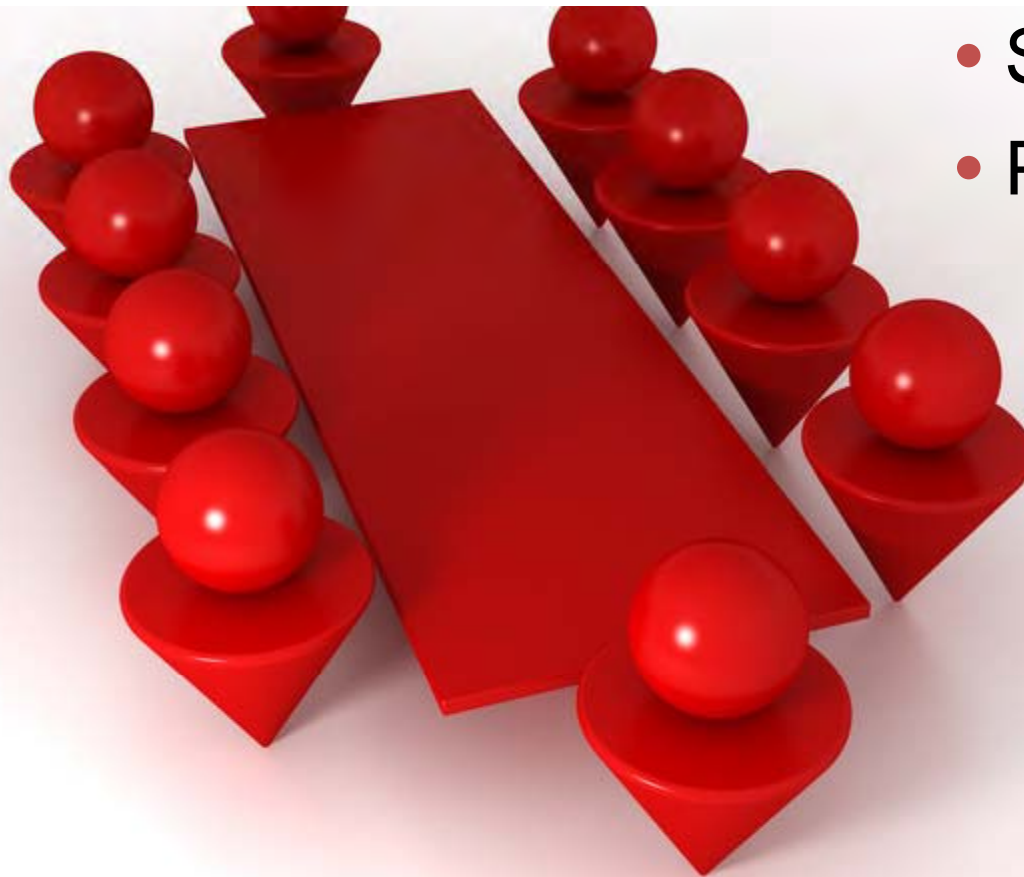
- What is the strategy of the organization?
- Who is executing the strategy and what are their needs?



- Company Strategy
- News Stories (iNotes)
- Projects
- Department Strategies
- Organizational Structure
- Business Architecture

Customer Engagement

- Interviews
- Focus Groups
- Service Issues
- Past Complaints



Capture / Record

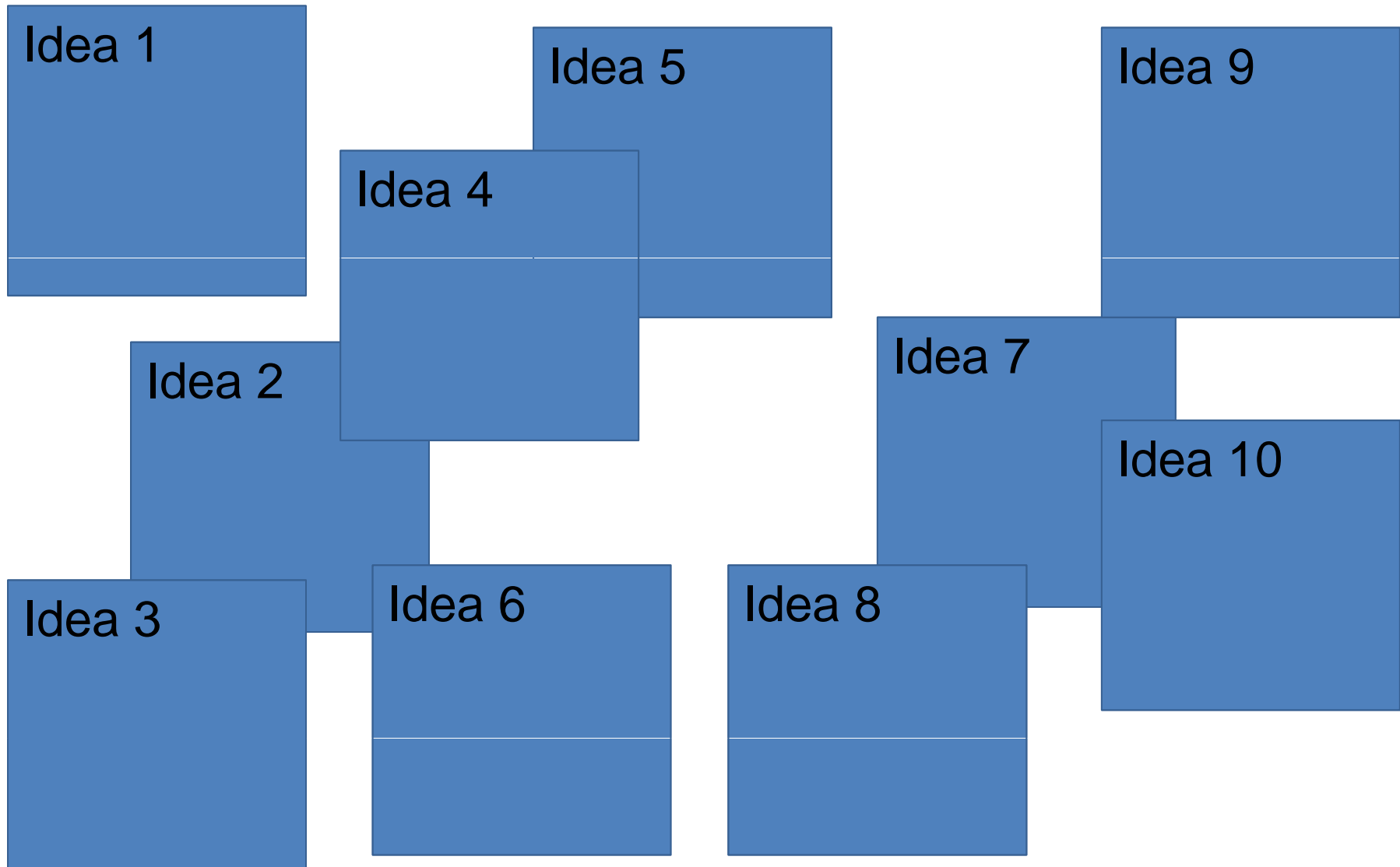
- Challenges – What keeps them up at night?
- Successes – What is occurring in their organizations that is noteworthy?
- *Names*
- *Dates*
- *Actual Statements from Participants*
- *Customer Terminology*

Pattern Identification

Affinity Diagram / Sticky Note Method

- Sort Ideas into natural themes by asking:
 - What ideas are similar?
 - Is this idea connected to any of the others?
- Organization
 - Headers
 - Color

Sticky Note Method



Sticky Note Method

Category 1

Idea 1

Idea 2

Idea 9

Category 2

Idea 5

Idea 10

Idea 4

Idea 7

Category 3

Idea 6

Idea 3

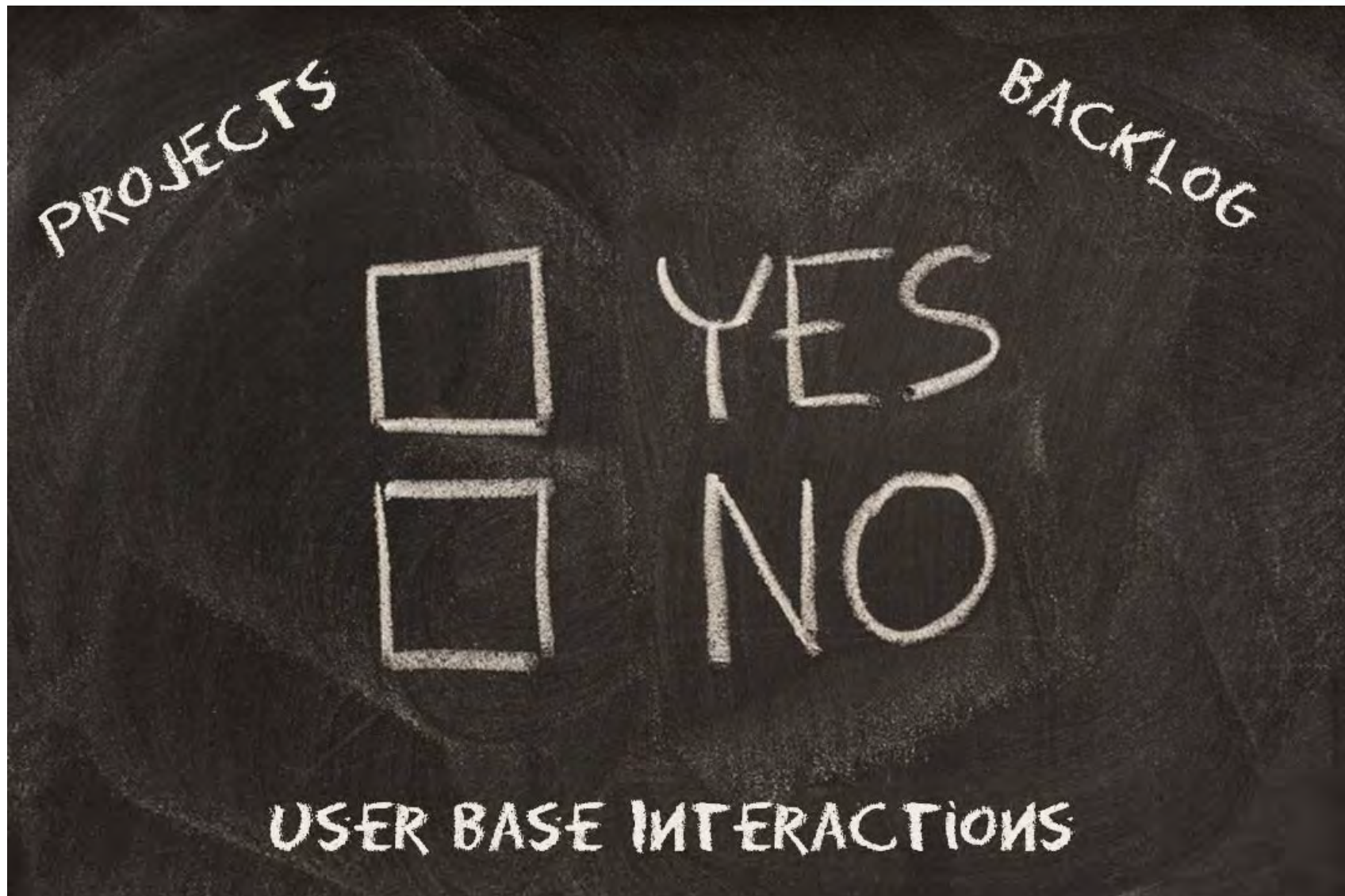
Idea 8

Strategy Identification

- High Level Strategic Areas
- End State Goals
- Prioritization



Strategic Validation



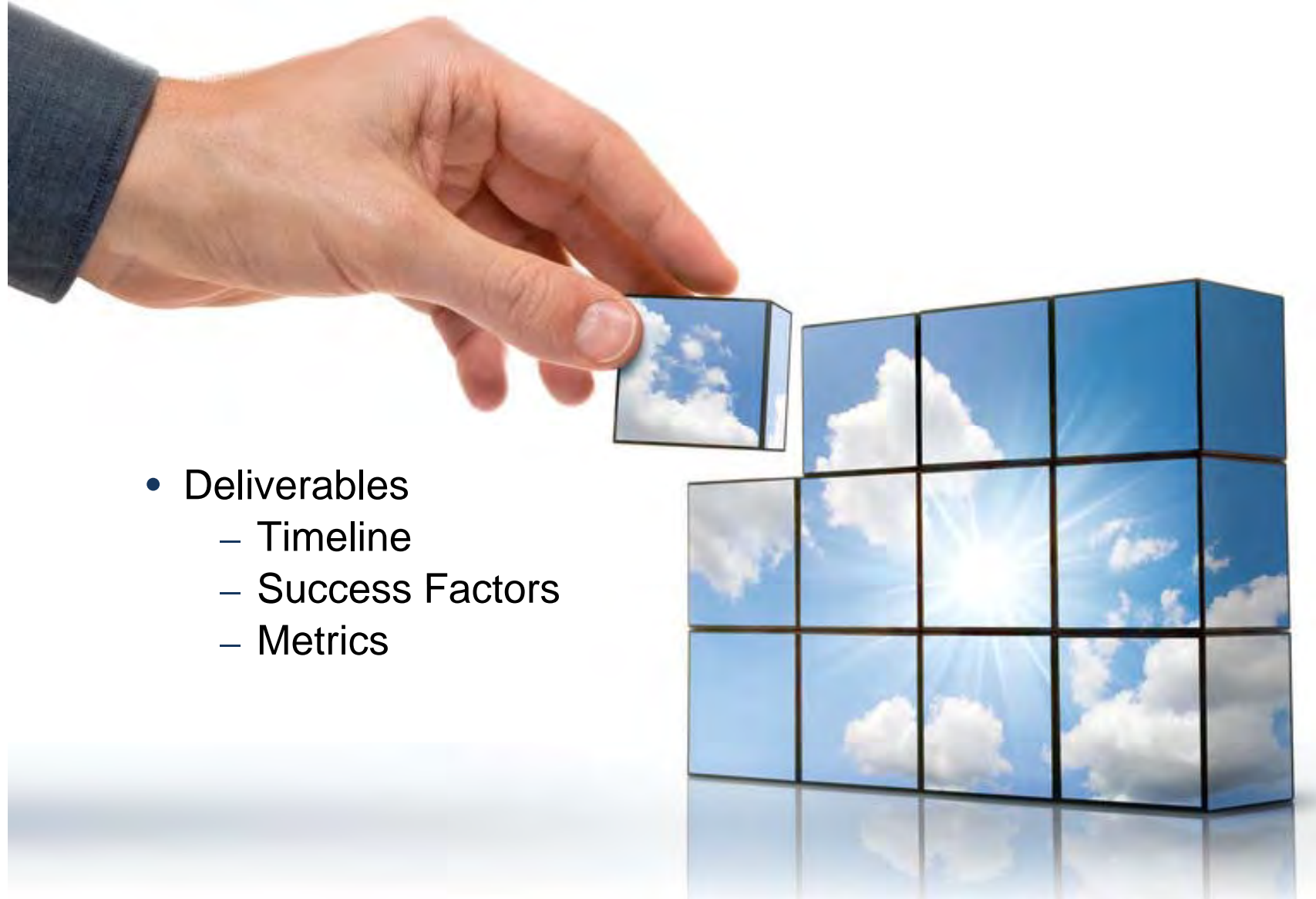
Distributed Ownership

- Strategic Initiative Review Meeting
 - Distributed Ownership
 - Presentation
 - Internalization



Planning Strategic Execution

- Deliverables
 - Timeline
 - Success Factors
 - Metrics



Strategic Plan

IM Strategic

2011 - 2013

20

Goal 1: Sustaining the Laboratory

Sustain the operations of the Laboratory by:

- Creating processes and constructs that will deliver a cost planned, executed, and managed effectively to provide
- Delivering high quality, reliable infrastructure that matches
- Providing means for ensuring that organizational human
- Developing background integration between systems to

Goal 2: Enabling the Laboratory

Enable growth in the Laboratory by:

- Delivering the right information, to the right people, in the
- Enabling secure and ever-present connectivity between the Laboratory.
- Supporting the Laboratory in establishing a reputation of
- Ensuring a robust and capable environment for Laboratory

Goal 3: Transforming the Laboratory

Transforming the Laboratory to a highly agile

- Combining technologies, processes and management to add value to Laboratory mission success.
- Ensure business processes that are intuitive and easy-to-work.
- Provide innovative solutions to mission organization challenges.
- Realign organizational resources supporting information Laboratory activities.

Goal 4: Protecting the Laboratory

Ensure protection of Laboratory assets by:

- Establishing an outcomes-based risk-management approach. Laboratory is best suited for the evolving security landscape.
- Enhancing the Laboratory usage of classified infrastructure programs.
- Identifying and organizing data across the Laboratory, both for Laboratory decision making.
- Creating an established lifecycle for systems that ensure mission through retirement of legacy systems and replacement

Transforming the Laboratory

High Performance Workplace

High Performance Workplace is the development framework that engages with organizations Laboratory in transformational activities to Laboratory performance.

A High Performance Workplace is an environment that combines technologies, processes and management to foster high individual, workgroup, and corporate performance. It includes multiple factors that enhance ability to deliver business value. It focuses on highly skilled workers so that they can be more and innovative. It supports employees in enabling in the areas of:

- Learning
- Discovering
- Innovating
- Leading

The High Performance Workplace initiative will:

The High Performance Workplace initiative will:

- Empower employees to deliver business value through effective use of process, information and technology.
- Provide an environment that fosters creativity and innovation.
- Facilitate organizational change to ensure future mission success.

Roadmap

IM Strategic Initiative

2011 Deliverables

2012 Deliverables

Evolve

- 1 High Performance Workplace (HPW)
- 2 Business Enablement Framework
- 3 Information Management Consolidation

- 1 HPW Services (E-mail, calendaring, instant messaging)
- 2 Management systems - mission integration
- 3 Future service roadmaps (HR, PMO, Finance)
- 4 Lab-wide IM assessment
- 5 Integration of Information Services

- 1 HPW Services (Internal / external collaboration)
- 1 100% of Lotus Notes divested
- 2 Future service roadmaps (Supply Chain, F&SS, ES&H)
- 3 Lab-wide IM consolidation plan

Sustain

- 4 Operational Excellence
- 5 Solidifying Electronic Infrastructure
- 6 Reputation & Professionalism
- 7 System Integration

- 4 Cross-functional Advisory Group for software investments
- 5 Enhanced mobile capabilities
- 6 Voicemail integration with messaging environment
- 7 Identification of strategic business systems (asset portfolio)

- 4 IM service optimization (commodity divestment)
- 5 Enhanced telecommuter support services
- 7 Integration of strategic business systems (PMO, Finance, HR)

Enable

- 1 Information & Knowledge Management
- 2 Collaboration & Communication
- 3 Reputation & Professionalism
- 4 Modeling & Simulation Infrastructure

- 1 INL Business Intelligence foundation and information value assessment
- 2 Enhanced video conferencing
- 3 HPW FY-12 requirements
- 4 Innovation Community of Practice to identify strategic investments
- 5 New high-speed super-cluster
- 6 Idaho Computing Consortium

- 1 Multi-source information aggregation
- 1 INL information benchmark (Hackett)
- 2 INL mobile device applications (e.g. TA, expense report, timesheet)
- 3 Desktop video conferencing
- 4 HPW FY-13 requirements
- 5 HPC data center expansion

Protect

- 1 Evolving Cyber Security
- 2 Enhancing Classified Infrastructure
- 3 Information Acquisition & Stewardship
- 4 Divestment of Legacy Systems

- 2 Secure mobile device expansion
- 3 Classified workstation expansion
- 4 INL data dictionary
- 5 IM asset evaluation (identifying \$5 million for commoditization & divestment)

- 2 Identity and access management (smart card)
- 3 Virtualized classified architecture
- 4 INL knowledge capture
- 5 INL business information transparency

Next: IM

**Project
Execution**

Requirements

Solution
Design

Metrics

**Enterprise
Architecture**

Information

Business
Process

Technology

**Strategic
Initiatives**

Deliverables

Success
Factors

Metrics

Next: Business

- Strategic Plan = Tool
 - Communicate
 - Re-Engagement
 - Re-Calibration

